

Complaints Policy

What is a complaint?

A complaint is an expression of dissatisfaction made to or about us; related to our services, staff or our handling of a complaint, where a response or resolution is explicitly or implicitly expected or legally required.

This policy does not apply to complaints by way of negative or critical feedback, which although valuable, do not require resolution or follow-up.

If your complaint relates to a Wealth Advisory service, please refer to [Making A Complaint – Wealth](#).

How to make a complaint

If you would like to make a complaint about a particular engagement, partner, or employee, please email clientservices@belay.com.au.

When making your complaint please tell us:

1. your name and contact details
2. what your complaint is about
3. any supporting documentation
4. details of the regular contact at Belay; and
5. what you are seeking to resolve your complaint.

How we will handle your information and protect your privacy

We will handle any personal information received as part of the complaint handling in accordance with our [Privacy Policy](#) and only for the purpose of dealing with the complaint.

Acknowledging your complaint

We will acknowledge receipt of your complaint in writing within 20 business days, or as soon as practicable thereafter. When acknowledging your complaint, we will also have regard to any preferences you have communicated to us in relation to the way in which you wish for us to communicate with you.

Investigation of your complaint

We will try and resolve the complaint as quickly as possible. If we cannot resolve your complaint immediately, we will need some time to investigate your concerns. We may request that you provide us with further information to assist with our investigation.

We will endeavour to resolve your complaint in 30 calendar days, but this may not be possible on all occasions. Where our review is likely to take longer, we will contact you to inform you why our response is taking longer and indicate when we expect to complete our review.

We will provide you with our written reasons for the outcome of your complaint.

Escalating your complaint

Where your complaint concerns a tax agent service or BAS agent service that we have provided, you also have the right to make a complaint to the Tax Practitioners Board in accordance with their complaints process described here <https://www.tpb.gov.au/complaints>